

Fourth Account and Report of Conservator of Estate and Petition for Settlement Thereof;
for Allowance of Compensation for Conservator of the Estate, and for Allowance of
Attorneys' Fees

			WESTAMERICA BANK , Successor Conservator of the Estate, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Marion F. Austin and H.F. Rick Leas are Co-Conservators of the Person. <u>SEE ADDITIONAL PAGES</u>
			Account period: 9/1/13 – 8/31/15 Accounting: \$1,367,116.59 Beginning POH: \$ 899,728.37 Ending POH: \$ 894,400.95 (\$1,123.73 cash plus mutual funds, annuities, residential real property)	
	Aff.Sub.Wit.		Trustee: \$15,448.45 (1% of the average market value of the estate computed monthly. \$7,724.24 has already been received, \$7,724.21 remains due. Petitioner also requests authority to continue to pay itself on a monthly basis 50% of the compensation so computed and request the balance upon the approval of the next accounting. Please see Declaration re taxes, administrative duties, accounting, receipts and disbursements.)	
✓	Verified			
	Inventory		Attorney (Baker Manock): \$4,173.50 (for 4.3 attorney hours @ \$395/hr plus 14.8 paralegal hours @ \$150/hr for service in connection with the Third Account, the Fourth Account, and general administrative and budget and financial issues, per itemization)	
	PTC			
	Not.Cred.		Attorney (Lerandeau): \$2,545.50 (for attorney and paralegal from \$125-300/hr services in connection with issues related to alleged harassment, stalking, and co-parenting with the father of the Conservatee's youngest daughter.	
✓	Notice of Hrg			
✓	Aff.Mail	W	Costs: \$435.00 (filing)	Reviewed by: skc Reviewed on: 11/9/15 Updates: Recommendation: File 1 – Hood
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	2620(c)			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			

Page 2

The Conservatee has two minor children, Amanda (15) and Samantha (7). Conservatee is Amanda's sole source of financial support. Conservatee has engaged the services of Lerandeau & Lerandeau with regard to family law, support, and restraining order issues in connection with Samantha's father. Petitioner has not been informed whether the Conservatee personally receives any support from Samantha's father; however, Petitioner does not receive any child support payments.

Petitioner states the Conservatee is paid a monthly allowance of \$2,250 in weekly payments of \$519.23, from which the Conservatee pays for incidentals such as gym membership, clothing for the minors, groceries, pet supplies, misc. entertainment.

Petitioner states the Conservators of the Person have requested that for certain months of the year, the allowance be increased as follows:

- Because the Conservatee's children's birthdays are in June and July, that the allowance be increased by \$100 for those two months so the Conservatee has extra funds to purchase birthday gifts for her children.
- Because both children go back to school in August, the Conservatee's allowance should be increased by \$300 for the month of August.
- An additional \$300 should be paid to the Conservatee in the month of December for extra money for Christmas presents for her children.

Allowance for Amanda: Petitioner states the Conservatee's oldest daughter Amanda is 15 and attends Bullard High School, but is unable to participate in school activities because she does not have her own money to spend. The Conservators of the Person have requested that Amanda be paid an allowance of \$35/week on a re-loadable debit card.

Petitioner requests that:

1. The Court make an order approving, allowing, and settling the fourth account and report of the conservatorship as filed;
2. Petitioner be authorized and directed to increase the amount of the monthly allowance paid to the Conservatee as follows: June \$100, July \$100, August \$300, December \$300.
3. Petitioner be authorized and directed to pay Amanda Hood the amount of \$35/week on a re-loadable debit card;
4. Additional compensation to Petitioner of \$7,724.21 for the accounting period be authorized and directed;
5. Petitioner be authorized and directed to continue to pay itself monthly fifty percent (50%) of its compensation computed as stated herein;
6. Petitioner be authorized and directed to pay Baker Manock & Jensen PC, its attorney, \$4,173.50 for legal services rendered to the Conservatee; and
7. Petitioner be authorized and directed to pay Lerandeau & Lerandeau \$2,545.50 for legal services rendered to the Conservatee; and
8. Such further order as the Court considers proper.

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NEEDS/PROBLEMS/COMMENTS:

1. The Court may require clarification regarding the family law matter(s) and bill from Attorney Lerandeau. The declaration and billing statements do not indicate what, if any, case number the work was associated with, and Court records do not indicate any recent activity in any family law matters involving this Ms. Hood since 2013.
2. Billing statement of Attorney Lerandeau indicates a \$53.00 fee for "Runner-Document Retrieval." This is considered by the Court to be a cost of doing business and not reimbursable. See Local Rule 7.17.B. The Court may reduce payment by this amount.
3. It appears that a substantial amount was spent on the home during this account period, including interior and exterior painting, windows, garage door installation and then further repair, shower remodel, interior blinds, new rain gutters, new refrigerator, new dryer, new flooring. Due to the extensive history of this file, prior volumes are not available for Examiner review, and Examiner is unable to tell whether this work was authorized or was required to be authorized, and the petition does not explain the necessity, etc. Therefore, need clarification, and for future account purposes, an explanation of this type of disbursement would be helpful to the Court.
4. Examiner notes that certain disbursements, such as AT&T, Comcast, PG&E/utilities, and cleaning services are somewhat inconsistent, with payments ranging widely in amounts. For example, it appears the typical AT&T payment is \$240; however, there are also payments for as low as \$20 and as high as \$500. Similarly, Comcast and PG&E payments also appear to fluctuate more than is typical. The Court may require clarification.

Eleventh Account and Report of Trustee and Petition for its Approval; and for Allowance of Trustee's and Attorney's Fees and Costs

		BRUCE D. BICKEL , Successor Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>SEE ADDITIONAL PAGES</u>
		Account period: 7/1/13 – 6/30/15 Accounting: \$167,954.06 Beginning POH: \$ 47,668.65 Ending POH: \$ 50,320.09 (\$29,810.23 is cash)	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Petitioner states Daniel had previously moved to Merced, CA, to live closer to his adult son and brother. His son was to assume primary caregiving duties for Daniel. However, they had a falling out, and his sister Roseanne agreed to assume caregiver duties. They subsequently moved to a rental home in Merced for which Roseanne pays the rent. According to Roseanne, Daniel's health has deteriorated over the past few months.	
		Petitioner states keeping Daniel on a budget continues to be a struggle. His PG&E and Comcast bills were often twice as much as the agreed-upon budgeted amount, and his prescription medication is a major expense. As trustee, Petitioner's struggle is balancing the extreme nature of Daniel's health and condition against the need to control the budget within realistic parameters.	
		Trustee: \$22,790.70 (for 186.69 hours @ \$60-150/hr according to services, per attached Declaration. Categories include administrative services, transactional services, case management services, and case services.	
		Attorney: \$2,948.00 (\$2,513.00 plus \$435.00)	
		Petitioner prays for an order: 1. Settling the account and report and confirming the acts of Petitioner for the account period; 2. Authorizing Petitioner to pay himself as trustee, as trust funds become available, the sum of \$22,790.070 for services rendered to the trust and to Daniel; 3. Authorizing Petitioner to pay to Gregory J. Roberts, as trust funds become available, the sum of \$2,513.00 for legal services rendered through 9/24/14 and \$435.00 in costs, for a total of \$2,948.00; and 4. For such other orders as the Court may deem proper.	
		Reviewed by: skc	
		Reviewed on: 11/6/15	
		Updates:	
		Recommendation:	
		File 2 – Duran	

NEEDS/PROBLEMS/COMMENTS:

1. Due to the extensive history of this file, for review purposes, the Court may require a brief summary in petitions going forward regarding the income and assets of the trust in accounting. It appears there is an annuity that pays \$5,000/month. Is this expected to continue for life or some other duration?
2. One of the assets of the trust is a promissory note with an adjusted carry value of \$1,705.00. It does not appear that any payments have been made to the trust on this note in many years. Need update on the status this note.
3. Disbursements Schedule indicates that various assets were purchased directly by the trust or reimbursed to the purchasers during this account period including a washer and dryer, various furniture items, and computer and accessories; however, these assets do not appear to be listed as new Property on Hand. The POH figure for the misc. personal items has not changed from the last account.

Therefore, need assets listed going forward as POH. Also, need clarification regarding the need for these purchases. Specifically, a washer and dryer were authorized to be purchased in 2011 for \$1,438.00 (according to Order Approving 8th Account filed 7/20/11. Was there a need for new appliances so soon?

4. Attorney requests cost of \$435 be reimbursed; however, this type of filing for a special needs trust should have been \$200. Therefore, the Court will review whether adjustment is appropriate.

Executor Murillo, Joel M. (Attorney/Executor)

Attorney Murphy, Christine M. (Deputy Attorney General – Objector)

Motion to Termination Further Proceedings and Discharge of Personal Representative

DOD: 04/15/05		<p>JOEL MURILLO was appointed Executor with Full IAEA without bond and Letters issued on 02/22/2006.</p> <p>Petitioner states: in the petition for probate filed 08/26/2005, movant alleged that the value of the assets of decedent subject to probate administration was \$155,000.00. This allegations was based on the best evidence available that decedent died possessed of the real estate at 10651 Fantz, Del Rey, California (the said real estate), which was subject to administration. On June 25, 2014, a final Inventory and Appraisal was filed in this estate reflecting that property. However, the property described above is not now or was it on June 25, 2014, property that is subject to administration. The reason is that on 06/09/2014, in Fresno Superior Court case 14CEPR00329, the court Ordered on the Petition to Determine Succession to Real Property pursuant to Probate Code § 13151 that the said real estate passed to Angelita Garcia. Thus, the said real estate is no longer an asset of this estate, rendering moot the Inventory and Appraisal filed on 06/25/2014.</p> <p>Movant diligently searched for all assets of decedent but failed to discover any property of any kind belonging to the estate that is subject to administration.</p> <p>All costs, expenses, and premiums on surety bonds, incurred in the administration of the estate have been paid.</p> <p>A request for special notice was filed by the California Department of Health Services and notice of the time and place of hearing on this motion was given as required by law.</p> <p>Wherefore, movant prays:</p> <ol style="list-style-type: none"> 1. For an order terminating further proceedings for the administration of the estate. 2. For an order to discharge the personal representative of the estate. 3. For such other orders as the court may deem proper. <p>Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order of 07/30/2015: Mr. Murillo reports that he received a proposed settlement agreement from the Department of Health Services; requests 90 days.</p> <p>Note: Petition filed Amended Notice of Motion to Terminate Further Proceedings and Discharge of Personal Representative was filed on 08/06/2015, requesting that the court issue orders pursuant to Probate §§ 12250 and 12251 to terminate further proceedings and discharge the personal representative as there are no assets for distribution in the estate, however no one has been noticed.</p> <p>The following issues still remain:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing on mandatory Judicial Council form. 2. Need Notice of Hearing with proof of service to be served on all interested parties. 3. Need Notice to the Department of Health Care Services pursuant to the Request for Special Notice filed 07/03/2006.
Cont. from 070215, 073015			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg <input checked="" type="checkbox"/>		
<input type="checkbox"/>	Aff.Mail <input checked="" type="checkbox"/>		
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<input type="checkbox"/>	Video Receipt		
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<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LV</p> <p>Reviewed on: 11/06/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 3 - Rodriguez</p>	

Opposition to Motion to Terminate Further Proceedings and Discharge of Personal Representative filed 06/24/2015 by Christine M. Murphy, Deputy Attorney General, states on May 27, 2015, the personal representative of decedent Elvira Rodriguez, Joel Murillo, filed a "Motion to Termination (sic) Further Proceedings and Discharge of Personal Representative". While the Department of Health Care Services (Department) was served with the motion, counsel for the Department was not and did not receive a copy of the motion until mid-June. Department opposes the granting of Motion on the grounds that the Judgment and Judgment Lien against petitioner Joel Murillo, as personal representative, has not been satisfied.

Department obtained a judgment against Joel Murillo, as representative of the Estate of Elvira Rodriguez, on August 9, 2009 in *Shewry v. Murrillo*, Fresno Superior Court Case No. 08CECG03103DRF. Attached here to as Exhibit A is a copy of the Notice of Entry of Judgment and Judgment in that case. Subsequently, a Judgment Lien was recorded against the estate property of decedent at 10651 E. Fantz Ave. Del Rey, California, 93616 (Estate Property). Attached hereto as Exhibit B is a copy of the Judgment lien. The lien remains on the estate property and has not been satisfied by the petitioner.

After the filing of the judgment lien, Joel Murillo initiated another action to probate the estate property of the decedent Elvira Rodriguez. (Matter of Elvira Rodriguez, Fresno Superior Court, Case No. 14CEPR00329.) In the later action, the Court issued an order dated 06/09/2014, determining that the estate property of Elvira Rodriguez succeed to the beneficiary of the Will, Angelita Garcia.

Department opposes the granting of the present motion on the grounds that the judgment against petitioner Joel Murillo, as personal representative in the above-entitled matter, and the judgment lien, have not been satisfied. Thus, any order of discharge would not be appropriate without satisfaction of the judgment and lien.

Further, denial of the motion to discharge Joel Murillo, as personal representative, will preserve the Department's claim and avoid further litigation. Department is concerned that because of the multiple proceedings probating the estate property there may be a later challenge by Angelita Garcia to the legitimacy of the Department's lien against the Estate Property. The Department wants to avoid the need for a Court action pursuant to Welfare and Institutions Code section 14009.5 against Angelita Garcia as a recipient of estate property or an action for payment from the personal representative. Thus, the Department respectfully requests that the Court deny the motion seeking to terminate further proceedings and to discharge Joel Murillo as personal representative until the judgment is satisfied by either settlement involving the beneficiary of the Estate Property, recognition of the lien by Angelita Garcia, or payment of the Department's claim.

Also, the parties are presently in settlement discussions regarding the satisfaction of the Department's Judgment and lien. Department, thus, requests that the Court continue this motion to allow for the entry of a settlement agreement addressing the issues raised by the outstanding judgment and requests a continuance until at least August 14, 2015 for the drafting of said settlement agreement.

For the foregoing reasons, Department respectfully requests the Court deny the motion or, in the alternative, continue the motion to allow for the entry of settlement agreement.

**Fourth Account and Report By Bruce D. Bickel, Trustee, Petition for Settlement;
Approval and Allowance of Trustee's and Attorney's Fees**

		BRUCE D. BICKEL , Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner paid a filing fee of \$435.00 for this Petition and Attorney requests reimbursement of \$435.00 advanced on behalf of the Trust; however, the filing fee for Petitions in Special Needs Trust matters is \$200.00 pursuant to the Statewide Civil Fee Schedule. 2. Need account statements for any financial institutions in which money or other assets were held during the account period. (California Rule of Court 7.903 (c)(6)).
		Account period: 10/01/12 – 09/30/14	
		Accounting: \$248,620.67	
		Beginning POH: \$215,114.33	
		Ending POH: \$88,316.21	
		(\$28,939.24 is cash)	
		Trustee: \$7,181.28 (per itemization and Declaration for 73.44 hours @ a combined effective rate of \$122.22/hr.; fees discounted by 20%)	
		Attorney: \$1,787.50 (per itemization and Declaration for 5.5 hours @ \$325/hr.)	
		Costs: \$435.00 (filing fees)	
		Bond: \$393,454.61 (sufficient)	
		Petitioner prays for an Order:	
		1. Approving, allowing, and settling the Fourth Account and Report;	
		2. Approving all acts and transactions of the Trustee shown by this Fourth Account and Report;	
		3. Authorizing payment to the Trustee of \$7,181.28;	
		4. Authorizing payment to the Attorney of \$1,787.50 plus \$435.00 in costs; and	
		5. For such further orders as are proper.	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	2620(c)	x	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 11/09/15
			Updates:
			Recommendation:
			File 4 – Castillo

Status Hearing Re: Informal accounting of closing reserve

DOD: 8/28/11	The Second and Final Account of Co-Executors SUSAN J. QUINN and RHONDA WALLACE was settled on 11/20/14.	NEEDS/PROBLEMS/ COMMENTS:
Cont. from 052015	At the hearing on 11/20/14, the Court set this status hearing for informal accounting of the \$25,000.99 closing reserve pursuant to recent court practices.	<u>Minute Order 5/20/15:</u> Counsel represents that they are waiting to hear from the IRS regarding a tax issue; requests 6 months.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Status Report filed 11/9/15 states the IRS has made a determination of the income taxes due for 2008, 2009 and 2010 plus penalties, for a total of \$11,754.13. Mr. Knudson has been trying without success to communicate with the IRS concerning the penalties. Finally on or about 11/3/15, contact was made with a Ms. Ware at the IRS. The situation was explained to her, and Mr. Knudson finally believed she was a person who understood the situation.	1. Need informal accounting of the \$25,000.99 closing reserve. If filed prior to the hearing pursuant to Local Rule 7.5, the status hearing may be taken off calendar.
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	What transpired was this: Following the decedent's death, it was found that she neglected to file her income taxes for several years. The service reported that 2010 had been filed and a refund credited, so the executors filed returns for 2008 and 2009, paid the balance of taxes due, per the returns, giving credit for the refund for 2010. However, in 2012 it was determined that the 2010 return was a fraudulent return. No refund was due the decedent; therefore the funds that had applied to 2008 and 2009 were withdrawn, and the IRS assessed penalties and interest for 2008, 2009, and 2010.	Note: Filing of the informal accounting of closing reserve will not generate a new hearing date.
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt	The taxes have been paid. Ms. Ware of the IRS urged that a request for abatement of penalties and interest be filed. A letter was sent to the Cincinnati service center on 11/4/15.	Reviewed by: skc
UCCJEA		Reviewed on: 11/5/15
Citation		Updates: 11/10/15
FTB Notice	The reserve balance is \$25,000.99. It is anticipated that the matter will be resolved in the next 60-90 days; either the IRA will waive the penalties and interest, or they won't. It is respectfully requested that the court set such further status hearings as may be appropriate or that further status hearings be waived, in the court's discretion.	Recommendation:
		File 5 - Quinn

Atty Kruthers, Heather (for Public Administrator – Petitioner)
 Atty Roberts, Gregory J. (for Joseph Balagno – Beneficiary - Objector)
 Atty Armo, Lance E. (for Linda Balagno and Lori Brown – Beneficiaries)
 Atty Gromis, David Paul (for Nicholas Kovacevich – Former Trustee)
 Atty Johnson, Summer (for Mary Pond – Respondent)

First and Final Account and Report of Successor Trustee; Petition for Allowance of Compensation to Successor Trustee and her Attorney; and for Distribution

		FRESNO COUNTY PUBLIC ADMINISTRATOR, Successor Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 10/8/15:</u> Counsel represent that they have reached an agreement except as to the personal property and are still working towards resolution on that issue; request additional time to do so. Continued to 11/12/15. <u>Note:</u> On 7/28/15, the Court granted preliminary distribution of \$50,000.00 to each of the four beneficiaries. <u>Note:</u> Joseph Balagno's objection was filed 9/22/15. See Page 2. <u>The following issues remain:</u> 1. Need receipts for the preliminary distribution from Linda Sue Balagno, Lori Jo Brown, Joseph Dale Balagno, and Mary Pond. 2. Given the preliminary distribution, need recalculation of final distribution and revised order.
		Account period: 10/15/13 – 5/27/15	
		Accounting: \$560,600.75	
		Beginning POH: \$516,776.66	
		Ending POH: \$503,035.65	
		(\$464,108.72 cash plus personal property)	
Cont. from 072815, 090115, 100815		Successor Trustee (Statutory): \$14,129.06	
<input type="checkbox"/>	Aff.Sub.Wit.	Successor Trustee (Extraordinary): \$248.00 (preparation, filing tax returns)	
<input checked="" type="checkbox"/>	Verified	Bond fee: \$2,102.27	
<input type="checkbox"/>	Inventory	Costs: \$141.50 (to pay to Fresno Superior Court for certified copies)	
<input type="checkbox"/>	PTC	Reserve: \$400.00 (for payment of any tax preparation after date of this account)	
<input type="checkbox"/>	Not.Cred.	Reserve: \$25,000.00 (pursuant to settlement agreement, for fees that may be awarded to the former trustee and his attorney)	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner states the children and longtime girlfriend of Dale W. Balagno entered into a settlement agreement regarding distribution of assets as follows:	
<input checked="" type="checkbox"/>	Aff.Mail	Linda Sue Balagno: \$101,880.95 cash plus Bersa handgun, 2005 Ford Mustang, 1965 Chevy Pickup, and 1985 Harley Davidson	
<input type="checkbox"/>	Aff.Pub.	Lori Jo Brown: \$101,880.96 cash plus Colt pistol, Smith & Wesson handgun, 2002 Harley Davidson	
<input type="checkbox"/>	Sp.Ntc.	Joseph Dale Balagno: \$101,880.96 cash plus Beretta handgun, Smith & Wesson handgun, .80 round of ammunition, .25 rounds of ammunition, Yellow ring with stones, Peugeot watch, Harley Davidson watch, Geneva watch, 2005 Harley Davidson	
<input type="checkbox"/>	Pers.Serv.	Mary Pond: \$101,880.96 cash	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Page 2

Objection to Proposed Distribution of Personal Property filed 9/22/15 by Joseph Balagno states he did not sign the settlement agreement. He agrees with all terms with the exception of the distribution of the personal property. In addition to the items being distributed to him, Joseph Dale Balagno should receive the following items that his father wanted him to have:

- 1965 Chevy Pickup
- 1986 Harley Davidson Sportster
- 1985 Harley Davidson
- Helmet, gloves, jacket
- 1/3 of the unclaimed property with the State Controller.

Joseph Dale Balagno has been told that he cannot receive the guns. If he cannot receive the guns, they should be distributed to his mother, Sarah Roberts, so they can ultimately be distributed to his children when they are old enough.

Declaration of Attorney Lance Armo filed 9/29/15 (Attorney for beneficiaries Linda Balagno and Lori Brown) states he has reviewed the objection with his clients. In light of said objection, his clients no longer agree to any further distribution of funds or personal items until and unless Joseph Balagno and his clients agree in writing to the distribution pursuant to the settlement agreement.

Further, his clients hereby request that the 1965 pickup located in the garage of Joseph Balagno's residence be turned over to the Public Administrator for the pendency of this matter.

Mr. Armo will not be present on 10/8/15 as he will be attending the State Bar Annual Meeting and Convention.

DOD: 9/28/11	ESTELLA GARZA GARZA, RAQUEL GARZA NANEZ, and ROJELIA GARZA GONZALEZ were appointed as Co-Executors on 5/27/14 with Limited IAEA without bond. Letters issued 10/3/14.	NEEDS/PROBLEMS/COMMENTS:
Cont. from 072115, 091315	At the hearing on 5/27/14, the Court set this status hearing for the filing of the first account or petition for final distribution.	OFF CALENDAR
Aff.Sub.Wit.		
Verified		First and Final Account filed 11/6/15 is set for hearing on 1/11/16.
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	Note re history: The following events have occurred in this estate: I&A Partial No. 1 filed 9/5/14 includes various real property with a total value of \$250,000.00. <i>Note: This I&A is defective. #5 (Property Tax Certificate) is checked "not applicable," however, that is not the case, because this I&A consists of real property.</i>	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	Final I&A filed 8/11/15 reflects additional real property valued at \$210,000.00.	
Conf. Screen	On 1/28/15, the Court confirmed the sale of one of the properties and ordered the proceeds placed into a blocked account. Receipt was filed 3/3/15.	
Letters		
Duties/Supp		
Objections	On 6/19/15, the Co-Executors filed an Ex Parte Petition for Withdrawal of Funds from Blocked Account that requested distribution of the funds in the blocked account to the beneficiaries. The petition was denied, as no order for distribution has been entered.	
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting	On 7/8/15, the Co-Executors filed a Petition for Preliminary Distribution that is set for hearing on 8/13/15.	Reviewed by: skc
Status Rpt		Reviewed on: 11/5/15
UCCJEA		Updates: 11/6/15
Citation		Recommendation:
FTB Notice	Status Report filed 7/16/15 (with notice of hearing to all heirs) states the estate is not in a condition to be closed at this time. Responses from the Franchise Tax Board and the Victim's Compensation and Government Claims Board are pending. The Final Inventory and Appraisal should be completed within 30 days. The Co-Executors have filed a Petition for Preliminary Distribution that is set for hearing on 8/13/15. An additional 60-90 days is requested to continue administration and to file a final account and petition for final distribution.	File 7 - Garza

Status Hearing Re: Filing of the First Account

DOD: 9/3/15	MARIA DE LOS ANGELES RODRIGUEZ, Step-Granddaughter, was appointed Conservator of the Person and Estate on 7/2/14.	NEEDS/PROBLEMS/COMMENTS: 1. Need first and final account pursuant to Probate Code §2620 or written status report pursuant to Local Rule 7.5.
Aff.Sub.Wit.	At the hearing on 7/2/14, the Court set this status hearing of the filing of the first account.	
Verified		
Inventory		
PTC	<u>Note:</u> I&A filed 12/1/14 included cash held in a blocked account, personal property, and real property in Monterey County, CA.	
Not.Cred.		
Notice of Hrg		
Aff.Mail	On 1/29/15, the court confirmed the sale of the real property and the proceeds were deposited to the blocked account.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen	<u>Note:</u> Notice of Death of Conservatee filed 10/6/15 states the Conservatee passed away on 9/3/15.	
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 11/5/15
		Updates:
		Recommendation:
		File 8 – Arevalo

DOD: 9/6/15		<p>LINDA CROUCH, Daughter and Conservator with bond of \$24,861.00, is Petitioner.</p> <p>Account period: 5/15/14 – 9/6/15 Accounting: \$141,223.76 Beginning POH: \$116,471.59 Ending POH: \$61,553.59</p> <p>Account period: 9/7/15 – 10/2/15 Accounting: \$64,553.59 Beginning POH: \$61,553.59 Ending POH: \$48,907.51</p> <p>Conservator waives compensation.</p> <p>Attorney: \$4,850.00 (Per Declaration filed 11/6/15, which reduces the amount requested from \$7,187.14 to \$4,850.00, per itemization)</p> <p>Petitioner states filed concurrently with this account is an Amended Supplemental I&A. Upon appointment, the conservator did not transfer the conservatee's jointly held interest into a conservatorship account. During the account period, certain items were paid out of this account as the conservator held a joint interest and did not realize she should not be using the account for personal expenses. On the advice of counsel, the conservator redeposited the sum of personal items she paid from the account. Attached is a copy of the transaction. She was in the process of changing title to the accounts for the conservatorship when the Conservatee died.</p> <p>Petitioner states she is the sole beneficiary of the conservatee's estate and has filed a Declaration under Probate Code §13100.</p> <p>Petitioner prays for an order:</p> <ol style="list-style-type: none"> 1. Approving, allowing and settling the attached account and report of the conservator as filed; 2. Authorizing \$7,187.14 in attorney fees; 3. Authorizing Petitioner to deliver the conservatee's remaining assets to LINDA CROUCH pursuant to Probate Code §§13100-13116; and 4. The Court make such other relief as it considers proper. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. The petition states \$3,500 is held in the attorney's client trust account to be applied to the attorney fees; however, the attorney's Declaration filed 11/6/15 does not mention this. Need clarification: Is the \$3,500.00 included in, or separate from the Ending POH figure of \$48,907.51? 2. Given the conservator's commingling of funds during the conservatorship, the Court may strike any language approving acts and transactions. 3. The proposed order is not in compliance with Local Rule 7.6.1.A, which requires monetary distributions to be stated in dollars. Need calculation of dollar amount to be distributed to Ms. Crouch per §13100.
<input checked="" type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
	Inventory		
	PTC		
	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: skc
Reviewed on: 11/10/15
Updates:
Recommendation:
File 9 – Welton

**First and Final Report of Personal Representative; Petition for Final Distribution on
First and Final Account; Waiver of Fees by Personal Representative; Petition for Payment of Compensation To
Attorney for Ordinary Services; Reimbursement of Costs Advanced by Attorney**

DOD: 09/11/13		DANA COX , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 09/11/13 – 09/02/15	
		Accounting: \$59,605.46	
		Beginning POH: \$59,586.60	
		Ending POH: \$53,184.90 (\$41,861.61 is cash)	
Cont. from		Executor: waived	
<input type="checkbox"/>	Aff.Sub.Wit.	Attorney: \$2,383.46 (statutory)	
<input checked="" type="checkbox"/>	Verified	Costs: \$1,365.00 (filing fees, publication, probate referee)	
<input checked="" type="checkbox"/>	Inventory	Petitioner alleges that decedent's will creates a valid testamentary trust. The decedent's intent to create a trust was manifested when he stated in the first paragraph that his will "is to be enforced, until [he] can get an attorney and make a living trust, then the trust will be effective [sic] and in force." The trust property is sufficiently designated as the residue of the estate after all specific distributions of personal property and copyrights to Dana Cox, leaving only cash to be held in trust according to the terms states in decedent's will. The beneficiaries are all named with the exception of "Amanda's son and daughter," which sufficiently identifies the only non-named beneficiaries as Delia Lopez and Caiden Lopez. The purpose of the trust is not illegal or against public policy but rather to distribute the residue in such a way as to provide for the beneficiaries' health, education, maintenance or support without disqualifying any of them from government assistance. This meets the requirements for a valid trust and petitioner requests that this court grant an order establishing the Gerald F. Cannan Testamentary Trust and appointing Dana Cox as trustee.	
<input checked="" type="checkbox"/>	PTC	Continued on Page 2	
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters	09/10/14	
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

Reviewed by: JF

Reviewed on: 11/10/15

Updates:

Recommendation:

File 10 – Cannan

Distribution, pursuant to Decedent's will and the testamentary Trust created thereby, is to:

Jess Cannan - \$1.00

Lila Poulsen - \$1.00

Dana Cox - Copyrights on the words and music for various songs, right to receive royalties from Broadcast Music, Inc.; Right to receive royalties from American Society of Composers, Authors and Publishers; 2006 Toyota Corolla; household furnishings

Dana Cox, as Trustee of the Gerald F. Cannan Testamentary Trust - \$38,113.18 to be further administered as follows:

Bonnie Cannan - to receive each month what SSI laws allow, with a savings account SSI allows

Rosemary Sutherland - to receive each month what SSI laws allow, with a savings account SSI allows

Francis Laursen - to receive each month what SSI laws allow, with a savings account SSI allows

Dana Cox - \$1,000.00/month

Delia Lopez - medical funds that Social Security or SSI do not cover

Caiden Lopez - medical funds that Social Security or SSI do not cover

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner filed this petition in pro per; however, Attorney Rosemarie Rusca remains Petitioner's attorney of record in this matter. The Court may require substitution be filed. 2. Petitioner does not provide the estimated value of the minor's estate. What are the expected benefits? Will there be a lump sum or monthly payments or both? Need estimate for bond purposes. 3. Probate Code and Cal. Rule of Court 7.207 require bond. Alternatively, the Court may allow funds to be placed into a blocked account for the minor pursuant to Local Rule 7.8. 4. If funds are ordered blocked, need Order to Deposit Funds Into Blocked Account (MC-355). The corresponding Receipt (MC-356) will then need to be acknowledged by the financial institution and filed. <u>Note:</u> If granted, the Court will set status hearings as follows: <ul style="list-style-type: none"> Thurs Jan 7, 2016 for filing bond or receipt for blocked account; Thurs April 14, 2016 for filing Inventory and Appraisal; Thurs Jan 12, 2017 for filing the first account current. If the proper items are on file, the status hearings may come off calendar.
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 11/10/15	
			Updates:	
			Recommendation:	
			File 11 - Sanders	

Waiver of Accounting, Report of Executor, and Petition for Allowance of Statutory Compensation for Ordinary Services and for Final Distribution

DOD: 02/19/14		JOAN E. HERWALDT , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Accounting is waived.	
Cont. from		I & A - \$364,695.18	
<input type="checkbox"/>	Aff.Sub.Wit.	POH - \$364,717.28	
<input checked="" type="checkbox"/>	Verified	(\$6,717.28 is cash)	
<input checked="" type="checkbox"/>	Inventory	Executor - waived	
<input checked="" type="checkbox"/>	PTC	Attorney - \$10,293.90	
<input checked="" type="checkbox"/>	Not.Cred.	(statutory, attorney fees in excess of the cash in the estate will be paid with funds outside of the probate estate)	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.	Costs - \$385.00 (filing fee less \$50.00 credit from attorney trust acct.)	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen	Distribution, pursuant to Decedent's will and agreement between the beneficiaries, is to:	
<input type="checkbox"/>	Letters	03/22/15	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections	Robert D. Harris: 100% interest in real property located at 74 W. Sierra Ave. #104, Fresno; 1/3 interest in real property located at 6635 N. West Ave, Fresno; 1/3 interest in household furnishings; 1/3 interest in 2004 Buick sedan	
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202	Joan E. Herwaldt: 1/3 interest in real property located at 6635 N. West Ave, Fresno; 1/3 interest in household furnishings; 1/3 interest in 2004 Buick sedan	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice	Timothy Harris: 1/3 interest in real property located at 6635 N. West Ave, Fresno; 1/3 interest in household furnishings; 1/3 interest in 2004 Buick sedan	

Reviewed by: JF

Reviewed on: 11/10/15

Updates:

Recommendation: SUBMITTED

File 12 - Harris

Attorney Gary L. Winter (for Petitioner Velia Juarez)

**Third Amended Petition for Probate of Lost Will and for Letters Testamentary;
Authorization to Administer Under the Independent Administration of
Estates Act**

DOD: 12/28/2014	VELIA JUAREZ , daughter and named Executor without bond, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:																																																																				
	Full IAEA: OK																																																																						
Cont. from 100815	Lost Will Dated: 8/20/1991		<p>Note: Court will set Status Hearings as follows:</p> <ul style="list-style-type: none"> Tuesday, April 19, 2016 at 9:00 a.m. in Dept. 303 for the filing of final inventory and appraisal; and Thursday, January 19, 2017 at 9:00 a.m. in Dept. 303 for the filing of first account and/or petition for final distribution. 																																																																				
<table border="1"> <tr><td>✓</td><td>Aff.Sub.Wit.</td><td></td></tr> <tr><td>✓</td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td>✓</td><td>Notice of Hrg</td><td></td></tr> <tr><td>✓</td><td>Aff.Mail</td><td></td></tr> <tr><td>✓</td><td>Aff.Pub.</td><td>W/</td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td></td></tr> <tr><td></td><td>Conf. Screen</td><td></td></tr> <tr><td>✓</td><td>Letters</td><td></td></tr> <tr><td>✓</td><td>Duties/Supp</td><td></td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td></td></tr> <tr><td></td><td>CI Report</td><td></td></tr> <tr><td></td><td>9202</td><td></td></tr> <tr><td>✓</td><td>Order</td><td></td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td></td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td></td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>	✓	Aff.Sub.Wit.			✓	Verified			Inventory			PTC			Not.Cred.		✓	Notice of Hrg		✓	Aff.Mail		✓	Aff.Pub.	W/		Sp.Ntc.			Pers.Serv.			Conf. Screen		✓	Letters		✓	Duties/Supp			Objections			Video Receipt			CI Report			9202		✓	Order			Aff. Posting			Status Rpt			UCCJEA			Citation			FTB Notice		<p>Residence: Del Rey, California Publication: Business Journal</p> <p>Estimated value of the Estate: Real property - \$300,000.00</p> <p>Total - \$300,000.00</p> <p>Probate Referee: Rick Smith</p> <p>Petitioner states:</p> <ul style="list-style-type: none"> The Decedent left a Will dated 8/20/1991 which Petitioner believes is the last Will of Decedent, and believes that the Will has never been revoked, but was lost; (<i>copy of Will attached as Exhibit A</i>); Petitioner is not aware of the location of the original signed Will; Petitioner's efforts to locate and contact Decedent's attorney to inquire about the whereabouts of the original Will were unsuccessful because the attorney has since resigned his license to practice law in California; Decedent had Alzheimer's Disease at the time of her death (<i>copy of death certificate attached as Exhibit B</i>); Decedent had been living with the disease for ~4 years prior to her death; because the disease compromises competency, the presumption of revocation under Probate Code § 6124 should be determined inapplicable in this matter.
✓	Aff.Sub.Wit.																																																																						
✓	Verified																																																																						
	Inventory																																																																						
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✓	Order																																																																						
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	Status Rpt																																																																						
	UCCJEA																																																																						
	Citation																																																																						
	FTB Notice																																																																						
			<p>Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.</p>																																																																				
			Reviewed by: LEG																																																																				
			Reviewed on: 11/10/15																																																																				
			Updates:																																																																				
			Recommendation: SUBMITTED																																																																				
			File 13 – Juarez																																																																				

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 11/6/81		<p>ROSIE FLORES YBARRA and LUPE FLORES YBARRA, Daughters, were appointed Administrators with Full IAEA with bond of \$200,000.00 on 6/11/15. Letters issued 6/22/15.</p> <p>At the hearing on 6/11/15, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Inventory and Appraisal pursuant to Probate Code §8800 or written status report pursuant to Local Rule 7.5.</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 11/10/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14 - Ybarra</p>	

Petition for Appointment of Guardian of the Person

		<u>TEMPORARY EXPIRES 11/12/15</u>	NEEDS/PROBLEMS/COMMENTS:
		SONIA GUTIERREZ-COVARRUBIAS , paternal aunt, is Petitioner.	<u>CONTINUED FROM 10/15/15</u> Minute Order from 10/15/15 states: Any objections by mother need to be filed by 10/29/15. No further service needed for Rosalva Saldana.
Cont. from 092415, 101515		Father: RENE GUTIERREZ-COVARRUBIAS – <i>personally served on 08/25/15</i>	As of 11/09/15, no objection has been filed by the mother.
<input type="checkbox"/>	Aff.Sub.Wit.	Mother: VERONICA MORENO – <i>personally served on 08/21/15</i>	
<input checked="" type="checkbox"/>	Verified	Paternal grandfather: FIDEL GUTIERREZ – <i>Served by mail on 08/26/15</i>	
<input type="checkbox"/>	Inventory	Paternal grandmother: VELIA GUTIERREZ – <i>Served by mail on 08/26/15</i>	
<input type="checkbox"/>	PTC	Maternal grandfather: SERGIO MORENO – <i>served by mail on 10/15/15</i>	
<input type="checkbox"/>	Not.Cred.	Maternal grandmother: ROSA SALDANA – <i>Served by mail on 10/08/15</i>	
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner states [see file for details].	
<input checked="" type="checkbox"/>	Aff.Mail w/	Court Investigator Dina Calvillo filed a report on 09/21/15.	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv. w/		
<input checked="" type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: JF
			Reviewed on: 11/09/15
			Updates:
			Recommendation:
			File 15 – Gutierrez

**Petition for Probate of Will and for Letters Testamentary; Authorization to Administer
Under the Independent Administration of Estates Act**

DOD: 05/16/15		BOBBY NASATO NAKANO aka BOBBY MASATO NAKANO , nephew/named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 10/06/15</u> Note: Status hearings will be set as follows: <ul style="list-style-type: none"> Thursday, April 7, 2016 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Thursday, December 8, 2016 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.	
Cont. from, 100615				
<input checked="" type="checkbox"/>	Aff.Sub.Wit.			Full IAEA – OK
<input checked="" type="checkbox"/>	Verified			Will dated 05/24/91
	Inventory			Residence: Fresno
	PTC			Publication: The Fresno Bee
	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg	Estimated Value of the Estate:		
<input checked="" type="checkbox"/>	Aff.Mail	Real property - \$100,000.00		
<input checked="" type="checkbox"/>	Aff.Pub.	Probate Referee: STEVEN DIEBERT		
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
<input checked="" type="checkbox"/>	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: JF	
			Reviewed on: 11/09/15	
			Updates:	
			Recommendation: SUBMITTED	
			File 16 – Nakano	

Attorney Zepure "Zeppy" Attashian (self-represented Attorney Petitioner)

Petition for Probate of Will and for Letters Testamentary

DOD: 11/27/2014		ZEPURE "ZEPPY" ATTASHIAN , Attorney and named Executor without bond, is Petitioner. Full IAEA: OK Will Dated: 5/9/2014 Residence: Clovis Publication: Business Journal <u>Estimated value of the Estate:</u> Real property - \$ 63,000.00 Personal property - \$ 41,786.00 Total - \$104,786.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Court will set Status Hearings as follows: <ul style="list-style-type: none"> Tuesday, April 19, 2016 at 9:00 a.m. in Dept. 303 for the filing of final inventory and appraisal; and Thursday, January 19, 2017 at 9:00 a.m. in Dept. 303 for the filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.	
Cont. from 100815				
<input type="checkbox"/>	Aff.Sub.Wit.			S/P
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/
<input checked="" type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: LEG Reviewed on: 11/10/15 Updates: Recommendation: SUBMITTED File 17 – Bongardt	

Attorney: Heather H. Kruthers (for Petitioner/Public Guardian)

Attorney: Deborah Boyett (Court appointed for Conservatee)

Attorney: Jeffrey A. Jaech (for Objector Diane Varao)

Petition for Appointment of Probate Conservator

		Public Guardian appointed Conservator of the estate on 10/1/15.	NEEDS/PROBLEMS/COMMENTS:
		Temporary of the Person Expires on 11/12/15.	Court Investigator Advised Rights on 9/11/15.
Cont. from 100115			Voting Rights Affected need Minute Order.
	Aff.Sub.Wit.		
✓	Verified		Continued from 10/1/15. Minute order states parties agree to the appointment of the Public Guardian as to the estate, and the Court so orders. Additionally, the Court orders the Public Guardian appointed as temporary Conservator, without prejudice, as to the person. Ms. Boyett requests 30 days for additional investigation.
	Inventory		
	PTC		1. Need Order (the previously submitted order was used when the Court granted the conservatorship of the estate.)
	Not.Cred.		
✓	Notice of Hrg		Note: Conservatorship of the Estate was granted on 10/1/15, therefore a status hearing will be set as follows:
✓	Aff.Mail	W/	
	Aff.Pub.		<ul style="list-style-type: none"> Wednesday, December 7, 2016 at 9:00 a.m. in Department 303, for the filing of the first account.
	Sp.Ntc.		
✓	Pers.Serv.		Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
	Screen		
✓	Letters		Reviewed by: KT Reviewed on: 11/6/15 Updates: Recommendation: File 18 – Madrigal
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		

Status Re: Filing Heggstad Petition

DOD: 5/27/15		<p>HARVEY A. ARMAS, Named Executor, filed a Petition for Probate of Will on 9/8/15.</p> <p>At the hearing on 10/15/15, the petition for probate was not granted and the Court ordered that a Heggstad be filed (with regard to the decedent's trust).</p> <p>The Court set this status hearing for the filing of such petition.</p> <p>On 11/6/15, Petitioner filed a Petition for an Order to Confirm Validity of Trust; Confirm Trustee; and Confirm Assets to Revocable Trust, which is set for hearing on 1/6/15 in this estate matter.</p> <p>However, the trust petition was filed into this estate matter, instead of being filed as a separate trust matter pursuant to Probate Code and Local Rules.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The petition filed 11/6/15 is in connection with the decedent's trust and as such must be filed separately from the estate. Therefore, this status hearing is not off calendar, because the petition was inappropriately filed in the estate case.</p> <p>Need petition filed as new trust case. See applicable law re trusts (Probate Code §17000 et seq.) and Local Rule 7.1.2, which requires that trusts be filed separately from estates.</p>
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
		<p>Reviewed by: skc</p> <p>Reviewed on: 11/9/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19 - Dostinich</p>	

**20 Marissa Castillo, Madisson Castillo,
Meggan Castillo (GUARD/P)**

Case No. 15CEPR00882

Petitioner Torres, Sandra Lee (Pro Per – Maternal Grandmother)

Petition for Appointment of Guardian of the Person

		<u>NO TEMPORARY REQUESTED</u>	NEEDS/PROBLEMS/COMMENTS:
		SANDRA LEE TORRES , maternal grandmother, is petitioner.	1. Notice of Hearing filed 10/07/2015 indicates that the Minor, Marissa Castillo, was served by mail on 09/16/2015; however personal service is required per §1511.
		<u>Please see petition for details</u>	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	w/	
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input checked="" type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: LV
			Reviewed on: 11/06/2015
			Updates:
			Recommendation:
			File 20 - Castillo

Petitioner Herminia Orozco Serna (Pro Per)

Petition for Appointment of Guardian of the Person

		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
		HERMINIA O. SERNA , paternal grandmother, is Petitioner.	<ol style="list-style-type: none"> 1. Need proof of personal service of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, for: <ul style="list-style-type: none"> • Jose S. Serna, father 2. Need proof of service by mail of the <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian</i>, or <i>Consent to Appointment of Guardian and Waiver of Notice</i>, or a <i>Declaration of Due Diligence</i>, for: <ul style="list-style-type: none"> • paternal grandfather; • maternal grandparents. 3. Petitioner's <i>Confidential Guardian Screening</i> form filed 9/10/2015 is incomplete at all personal information in Item 1, and does not include Attachment 14 explaining Petitioner having been previously appointed a guardian, conservator, executor, or fiduciary in another proceeding.
		~Please see Petition for details~	
Cont. from		Court Investigator's Report was filed on 10/26/2015.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
	Aff.Mail	X	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	Clearances		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LEG
			Reviewed on: 11/10/15
			Updates:
			Recommendation:
			File 21 - Serna

Spousal or Domestic Partner Property Petition

DOD: 6/15/15		<p>FLORENCE EYMANN, Surviving Spouse, is Petitioner.</p> <p>No other proceedings</p> <p>Will dated 10/8/90 devises the estate to Petitioner.</p> <p>Petitioner requests Court confirmation that the decedent's real property as specified on Attachment 7a passes to her pursuant to the will.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
<p>Reviewed by: skc</p> <p>Reviewed on: 11/10/15</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 22 - Eymann</p>				

Petition to Determine Succession to Real Property

DOD: 01/01/15		KATHERINE HELEN BUSSEY and SYLVIA SUSAN BAIRD , daughters, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
		40 days since DOD	1. The will is not self-proving. Need proof of subscribing witness. Although the will is not being admitted to probate, this summary proceeding does necessarily include a determination of validity. See Probate Code §13151 and commentary.
Cont. from		No other proceedings	
<input type="checkbox"/>	Aff.Sub.Wit.	<input checked="" type="checkbox"/>	<p>Note: Although the will is signed by two witnesses, the witness attestation does not include the required language that the witnesses signed under penalty of perjury.</p>
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

KATHERINE HELEN BUSSEY and SYLVIA SUSAN BAIRD, daughters, are Petitioners.

40 days since DOD

No other proceedings

I & A - \$9,583.33
(property located in Madera County)

I & A - \$135,200.00
(property located in Fresno County)

Will dated 07/10/02 devises all of decedent's interest in real properties located in Fresno County to Katherine Helen Bussey and all of her interest in real properties located in Madera County to Sylvia Susan Baird.

Petitioners request Court determination that decedent's interest in real property passes to them pursuant to decedent's will, as follows:

To Katherine Helen Bussey:

1. An undivided 5% interest in real property located at 7031 N. Blackstone, Fresno, CA 93650;
2. An undivided 4.17% interest in property located at 51 W. Beechwood, Fresno, CA 93650
3. An undivided 4.17% interest in the vacant lot adjacent to 51 W. Beechwood, Fresno, CA 93650
4. An undivided 5% interest in the improvements situated on 44 W. Herndon, Fresno, CA 93650

To Sylvia Susan Baird:

1. An undivided 1/24th interest in real property located at 14108 Highway 41, Madera, CA 93636

NEEDS/PROBLEMS/COMMENTS:

1. The will is not self-proving. Need proof of subscribing witness.

Although the will is not being admitted to probate, this summary proceeding does necessarily include a determination of validity. See Probate Code §13151 and commentary.

Note: Although the will is signed by two witnesses, the witness attestation does not include the required language that the witnesses signed under penalty of perjury.

Reviewed by: JF

Reviewed on: 11/10/15

Updates:

Recommendation:

File 23 - Hendrix

24	Beverly Christiansen (CONS/PE)	Case No. 15CEPR00976
Attorney	LeVan, Nancy J. (for Ronald Christiansen – Spouse – Petitioner)	
Attorney	Horton, Lisa (Court appointed for Proposed Conservatee)	
Objector	Washburn, Kimberly M. (Pro Per – Daughter – Objector)	
Objector	Macedo, Robbyn L. (Pro Per – Daughter – Objector)	
Objector	Smith, Robert M. (Pro Per – Son – Objector)	

Petition for Appointment of Probate Conservator of the Person and Estate

See petition for details.			NEEDS/PROBLEMS/COMMENTS: Court Investigator advised rights on 10/15/15 and 10/27/15. Voting rights affected – need minute order
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.	W	
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
✓	Objections		
✓	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
✓	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 11/10/15
			Updates:
			Recommendation:
			File 24 - Christiansen

Petitioner De Luca, Frank (pro per – brother/named Executor)

**Petition for Probate of Will and for Letters Testamentary: Authorization to
Administer under the Independent Administration to Estates Act**

DOD: 07/22/15	FRANK DE LUCA , brother/named Executor, is Petitioner.		NEEDS/PROBLEMS/COMMENTS:
	All heirs waive bond.		
	Full IAEA – OK		1. Proof of Subscribing Witness is missing attachment 1 (a copy of the will).
Cont. from	Will dated 09/30/2014		
<input checked="" type="checkbox"/> Aff.Sub.Wit.		Residence: Clovis	Note: Status hearings will be set as follows:
<input checked="" type="checkbox"/> Verified		Publication: The Business Journal	
Inventory		Estimated Value of the Estate:	<ul style="list-style-type: none"> • Thursday, April 7, 2016 at 9:00a.m. in Dept. 303 for the filing of the Final Inventory and Appraisal <u>and</u> • Thursday, January 12, 2017 9:00a.m. in Dept. 303 for the filing of the first account - Petition for final distribution.
PTC		Real property - \$173,333.00	
Not.Cred.		(I & A, Partial No. 1 has already been filed indicating real property only valued at \$173,333.00)	Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter, the status hearing will come off calendar and no appearance will be required.
<input checked="" type="checkbox"/> Notice of Hrg		Probate Referee: STEVEN DIEBERT	
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input checked="" type="checkbox"/> Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
<input checked="" type="checkbox"/> Order			
Aff. Posting			Reviewed by: JF
Status Rpt			Reviewed on: 11/10/15
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 25 – Virginia De Luca

Petition of Trustee to Appoint Successor Trustee

Age:		<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTNIUED TO 1/12/16</u></p> <p>Per attorney request</p>
DOD:		
Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	
	Conf. Screen	
	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
		Reviewed by: skc
		Reviewed on: 11/10/15
		Updates:
		Recommendation:
		File 26 - Bolton

Petition for Letters of Administration, Authorization to Administer under IAEA

DOD: 5/15/15		<p>GREGORY REYES, Son, is Petitioner and requests appointment as Administrator with Full IAEA without bond.</p> <p>Petitioner is the sole heir and waives bond.</p> <p>Full IAEA – need publication</p> <p>Decedent died intestate</p> <p>Residence: Clovis, CA Publication: Need</p> <p>Estimated value of estate: Personal property: 500.00 Real property: \$40,000.00 (\$175,00.00, encumbered for \$135,000.00)</p> <p>(Final I&A has been filed already indicating real property only valued at \$175,000.00.)</p> <p>Probate Referee: Rick Smith.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need publication per Probate Code §8120.</p> <p><u>Note:</u> The Court will set a status hearing for the filing of the first account or petition for final distribution as follows:</p> <ul style="list-style-type: none"> Thurs, Jan 5, 2017 <p>(I&A has already been filed.)</p>	
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			w
<input type="checkbox"/>	Aff.Pub.			x
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: skc
Reviewed on: 11/10/15
Updates:
Recommendation:
File 27 - Reyes

Probate Status Hearing RE: Proof of Increased Bond

	The GEORGE W. SATTERBERG, JR. SPECIAL NEEDS TRUST was established by Order of this Court on 03/17/14 in the matter of the Conservatorship of the Estate of George W. Satterberg, Jr. Janet L. Sorenson and Harriet Satterberg, were appointed as Co-Trustees of the Trust.	NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u> Order on Ex Parte Petition for Instructions re: Deposit of Funds in Blocked Account signed 11/09/15</p>
Cont. from 110415		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF Reviewed on: 11/09/15 Updates: Recommendation: File 28 – Satterberg

Petitioner Robinson, Nicole Marie (Pro Per – Cousin – Petitioner)

Objector Palms, Shanikwa (Pro Per – Mother – Objector)

Petition for Appointment of Temporary Guardian of the Person (Prob. Code §2250)

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: Minute Order 11/5/15: Ms. Robinson is to have Ms. Palms properly served for the general hearing on 12/15/15. Ms. Palms is ordered to not move out of or leave the state with the minor until this matter is resolved. The Court Investigator is to check related criminal records and interview the parties, reporting back with a recommendation to the Court regarding the temporary. 1. Need Notice of Hearing. 2. Need proof of personal service of Notice of Hearing with a copy of the petition at least five court days prior to the hearing per Probate Code §2250(e) <u>or</u> consent and waiver of notice <u>or</u> declaration of due diligence on: - Shanikwa Palms (Mother) - Yusuff Potts (Father) <u>Note:</u> Petition states father is unknown; however, CI Report identifies the father as Yusuff Potts. 3. Petitioner's Confidential Guardian Screening Form is incomplete. Need additional information.	
Cont. from 102915, 110515				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			X
✓	Letters			
✓	Duties/Supp			
✓	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc				
Reviewed on: 11/6/15				
Updates:				
Recommendation:				
File 29 - Potts				